Getting Started

Thank you for choosing Stone Profit Systems (SPS). This Workbook is a tool that will help you and your company during the beginning stages of your system setup. For your convenience, use the pages in this book to take notes, mark dates, and keep track of the entire install process.

Enclosed you will find:

- Timeline
- Install Checklist
- Configuration Questions
- Data Migration Instructions
- Client Computer Hints

URL: _____

Username: _____

Password: _____

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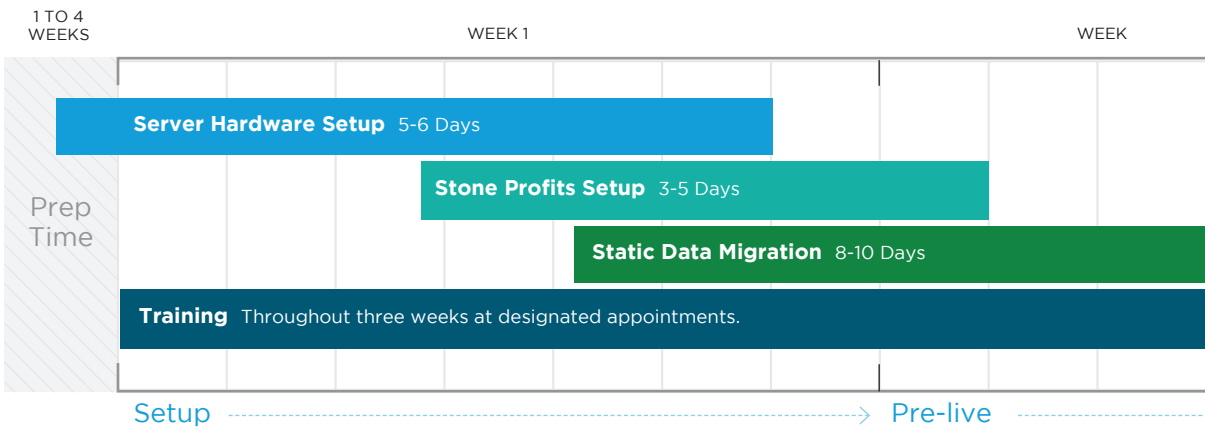
Installation Timeline



Server Hardware Setup

___ Hosting Server Quotations
___ Contracts and Paper Work
___ Install Windows Server
___ Install SQL Server
___ Configure IIS and SQL Server
___ Configure E-mail Server
___ Configure Fax Server

Stone Profits Setup

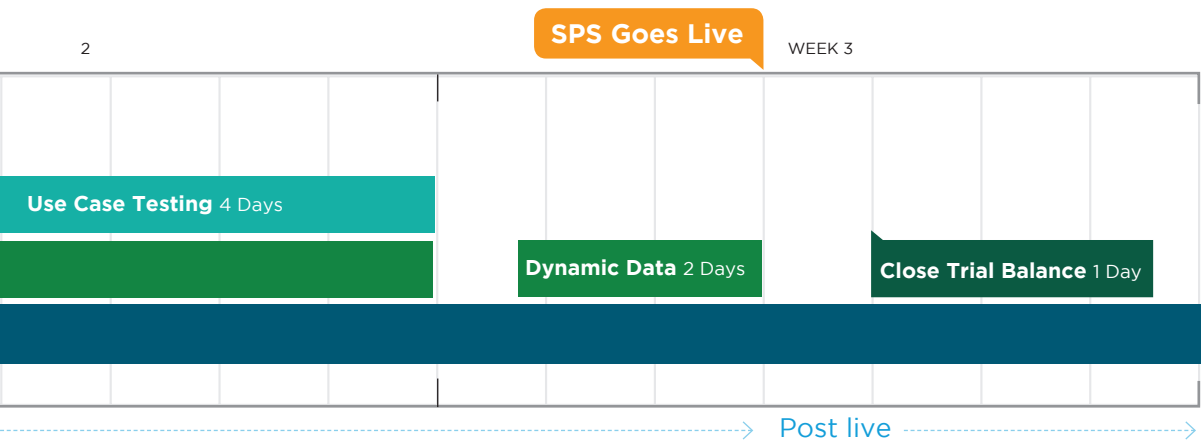
___ Install Stone Profit Systems
___ Install license File
___ Setup Locations
___ Logos
___ Addresses
___ Print Formats
___ Accounting Defaults
___ User Access Rights
___ Parameters
___ Drop-Downs
___ Print Disclaimers

Static Data Migration

___ Chart of Accounts
___ Customers
___ Products
___ Services
___ Suppliers
___ Vendors
___ Associates
___ Resources
___ Tax Codes and Authorities

Dynamic Data Migration

___ Inventory in-stock
___ Opened Accounts Receivable
___ Opened Accounts Payable



Use Case Testing

___ Purchase Scenarios
___ Inventory Scenarios
___ Sales Scenarios
___ Customer Login Scenarios

Training

___ Administration
___ Purchasing
___ Inventory
___ Pre-Sales
___ Sale Orders
___ Accounting
___ Reports

SPS Live

___ Date in which your company stops using old system/methods, and begins using Stone Profit Systems.

Post Live

___ Close Trial Balance

Install Checklist

1. Contracts

1.1 ___ Contracts Signed and Approved
1.2 ___ Wire Deposit
1.3 ___ (SPS) License File Generation
1.4 ___ Credit card setup for hosting fees

2. Server and System Installation

2.1 ___ (SPS) Install License File
2.2 ___ (SPS) Client entered into SPS support system
2.3 ___ (SPS) Setup basic system defaults - page 09
(Bar-Code prefix, Company Details)
2.4 ___ (SPS) Setup System URL
2.5 ___ Set up Control Switches - page 13

3. Static Data Migration - page 19

3.1 ___ Chart of Accounts
3.2 ___ Customers
3.3 ___ Item Master
3.4 ___ Services Master *
3.5 ___ Inventory Suppliers
3.6 ___ Non Inventory Vendors
3.7 ___ Associates
3.8 ___ Contacts
3.9 ___ Price List *
3.10 ___ Tax Codes
3.11 ___ Zip Codes

4. Training - page 43

4.1 ___ Admin and System Setup
(User Admin, System Terminology, Terms, Package Setup)
4.2 ___ Purchasing & Master List
(PO's, Supplier Invoice/Packing List, Inventory Receipts, Freight, and Landed Costs)
4.3 ___ Inventory
(Inventory Search, Adjustments, Transfers, Product Master List)
4.4 ___ Pre-Sales
(Opportunities, Quotes, Visits, Sample Orders, Transfers)

(SPS) = Stone Profit Systems Task

* If Applicable - Fabricator Items

4.5 ___ Sales
(Sales Orders, Job Tracking, Job Scheduling, Invoicing, Pick Tickets, Packing List)

4.6 ___ Scheduling *
(Calendar Views, Dashboards, Resources, Events and Event Types)

4.7 ___ Accounting & Reports
(AR, AP, Banking, General Ledger, System Reports)

5. Add-On Modules

___ _____

___ _____

___ _____

___ _____

6. System Configuration and Setup

6.1 ___ User Types and User Setup

6.2 ___ Quote Package Setup *

6.3 ___ Job Scheduling Setup *

6.4 ___ Print Documents Format and Policies Setup - page 47
(Quote, sale order, invoice, PO)

6.5 ___ Bar-Code Setup - page 65

6.6 ___ Send Void Business Check For Setup

6.7 ___ Fax Setup *
(Requires efax, rightfax, or similar online fax account)

7. Dynamic Data Migration - page 75

7.1 ___ Inventory Details
(Slabs and non-slabs)

7.2 ___ Open AR Invoices
(Open customer Invoice details)

7.3 ___ Open AR Receipts
(Open customer Payment/Receipts details)

7.4 ___ Open AP
(Open vendor Invoice details)

7.5 ___ Trial Balance
(Debit or credit balances in different accounts)

8. Go Live

8.1 ___ (SPS) Additional Support on Go Live Date

8.2 ___ Customer Satisfaction Report and Sign Off

8.3 ___ Wire Remaining Balance

8.4 ___ Credit Card Setup for Support and Maintenance

(SPS) = Stone Profit Systems Task

* If Applicable - Fabricator Items

Basic System Defaults

To Setup the system there is a set of variables that need to be deffined. These variables are essential to the operation of the system in accordance with your business. SPS will setup a call with you to go over all the variables and setup the approprate vales. This section of the book can be used to keep up with what has been discussed and what has not.

COMPLETED	SETUP SECTION	COMPLETED	SETUP SECTION
_____	Company	_____	Sales
_____	Product & Inventory	_____	Jobs & Scheduling
_____	Purchasing	_____	Sales Tax
_____	Pre-Sales	_____	Add-On Modules

Scheduled Phone Call: ___/___/___ _____:_____

Company Setup

COMPLETED	VARIABLES
_____	Bar-Code Prefix
_____	Login Screen Title
_____	Company Logo
_____	Print Company Title
_____	Purchase Print Address
_____	Sale Print Address
_____	Company Profile *(Address & Contact Info)*
_____	Business Process Options *(Items Kinds, Labels, Presale Labels, etc.)*
_____	Currency Setup
_____	Transaction Starting Numbers
_____	Party Starting Codes *(Customers, Suppliers, Vendors)*
_____	Event Types, Bin Types, Resource Types & Subtypes

Product & Inventory Setup

COMPLETED	VARIABLES
_____	Product line discussion *(Types, Categories, Groups)*
_____	Units of Measure
_____	Product Types & Forms
_____	Product Categories & Sub-Categories
_____	Product Groups
_____	Product Price Ranges
_____	Product Price Levels
_____	Inventory Identifiers
_____	Service Types
_____	Inventory Adjustment Reason Codes
_____	Bar-code Label Setup (p##)
_____	Hold Label Setup (p##)
_____	Logistics Codes

Purchasing Setup

COMPLETED	VARIABLES
_____	Inventory Supplier Types
_____	Supplier Ports
_____	PO Statuses

Pre-Sales Setup

COMPLETED	VARIABLES
_____	Quote Stages
_____	Quote Segments
_____	Project Types
_____	Calculator Setup
_____	Marketing Channels
_____	Quote Probability to Close %’s

Sales Setup

COMPLETED	VARIABLES
_____	Customer Types
_____	Delivery Methods
_____	Piece Types
_____	Pricing Discount Percentages

Jobs & Scheduling Setup *

COMPLETED	VARIABLES
_____	Event Categories / Workflow Departments
_____	Tasks and Milestone
_____	Event Sets *(Grouping of Tasks and Milestone)*

Sales Tax Setup

COMPLETED	VARIABLES
_____	Tax Items
_____	Tax Codes
_____	Tax Exempt Reasons

Addon Modules Setup

COMPLETED	VARIABLES
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Control Switches & Defaults

This section lists out various configurations that can be turned on or off depending on how you run your business. Please read through the following control switches, if one applies to your business fill in a value on the blank line. If the configuration does not apply to your business, mark “no” on the line. There will be hints along the way to help you fill in the appropriate value.

Y/N/Value	Section	Switch/Description
_____ MM/DD/YY	Company	**Go Live Date** This is the date that you will stop using your old system/ methods and begin using Stone Profit Systems SPS_GOLIVE_DATE
_____ YES/NO	Accounting	**Allow Unequal Journal Entries.** This would allow you to save journal entries in which the total debits does not equal the total credits. SPS_AllowUnequalJournalEntries
_____ CITY/NO	Customers	**Set Customers to a Default Location** Any new customer would be set to your desired location by default. 152 - defaultcustomerlocation

Y/N/Value	Section	Switch/Description
_____ YES/NO	Inventory	**Show Slabsmith Inventory** If your company uses Slabsmith, SPS can access the Slabsmith server and use the slab information and images. 492 - SPS_ShowSlabSmithInventory
_____ :\\COMPUTER\FILENAME\FILENAME -OR- NO	Slabsmith	**Enter the Path to the Slabsmith Image Folder Within the Slabsmith Server** If your company uses Slabsmith, SPS can access the Slabsmith server and use the slab images. To the left please provide the path to the image folder. *(:\\Computer\filename\filename)* 932 - SPS_Slabsmith_ImageFolderURL
_____ YES/NO	Invoice	**Allow Invoices to be Deleted** This would allow you to completely delete invoices in the system. 383 - SPS_DELETE_INVOICE_Allow
_____ CITY/NO	PO	**Set Default Location as Ship To for Purchase Orders** Any purchase order created would set the ship to address to your desired location by default. 401 - SPS_PO_DefaultLocation
_____ YES/NO	PO	**Show Consignment Locations for Ship To Drop-Down** This would allow the system to add consignment locations as a ship to address for POs if desired. 409 - SPS_PO_ShowConsignments_in_ShipTo

Y/N/Value	Section	Switch/Description
_____ YES/NO	PO	**In PO Show Customer in Ship To Field** This would allow the system to add customers as a ship to address for POs if desired. 410 - SPS_PO_ShowCustomers_in_ShipTo
_____ $0,000.00/NO	PO	**Set a Dollar Limit for PO Approval** This function allows you to set a dollar limit for POs. If a PO exceeds this amount, it will need approval before processing. 418 - SPS_PO_Without_Approval_Limit
_____ CITY/NO	Supplier Invoice / Packing List	**Set a Default Location as the Ship To for the Supplier Invoice/Packing List** Any supplier invoice/packing list created would set the ship to address to your desired location by default. 430 - DefaultSupplierInvoiceLocation
_____ YES/NO	SO	**Make Invoice Number the Same as SO** This function would force the system to match the invoice number to the Sale Order number from which the invoice was created. 373 - SPS_SO_InvoiceNumber_IsSameAS_SONumber
_____ YES/NO	SO	**Check Customer's Credit Standing for Pick Ticket** This function would compare the customer's balance to their credit limit, and confirm their credit standing. If the customer is over their limit, the pick ticket will not be made. 374 - SPS_PTI_Check_Credit_InPickTicket

Y/N/Value	Section	Switch/Description
_____ YES/NO	SO	**Ability to Select a freight Carrier for SO Shipments** This configuration will show a field in the SO page that would allow you to select a freight carrier that would complete the shipment/delivery. 330 - SPS_SO_ShowFreightCarrier
_____ YES/NO	SO	**Make Freight Carrier for SO Shipments Required** This configuration would make the freight carrier field required. 356 - SPS_SO_FreightForwarder_IS_Required
_____ YES/NO	SO	**Require Zip Code for Deliveries** This would make the ship to zip code field required for any deliveries. 319 - SPS_SO_Delivery_Zip_IsRequired
_____ YES/NO	SO	**Ship To and Bill To Must be Entered Contacts** This would require the Ship to and bill to address to be entries that are pre-registered with the customer in the customer contacts. SPS_SO_Shipto_Billto_ContactsOnly
_____ YES/NO	SO	**Determine Tax Rate by Zip Code** This function will use the ship to zip code to determine the tax. 338 - SPS_SO_Tax_Lookup_on_ZipCode

Y/N/Value	Section	Switch/Description
_____ YES/NO	SO	**All Products on SO are Taxable** This would make all products on a SO subject to taxes. 339 - SPS_SO_Products_Are_Taxable
_____ YES/NO	SO	**All Services on SO are Taxable** This would make all services on a SO subject to taxes. 341 - SPS_SO_Services_Are_Taxable
_____ YES/NO	SO Activity	**Setup Restrictions for Swapping Slabs When Picking for SOs** This function will address your teams ability to swap specified products on a SO with product that is easier to pick. SPS_SO_Show_PickTicketRestriction
_____ SLAB/LOT/PRODUCT/NO	SO Activity	**Setup Default Value for Swapping Restriction for Products on SO** Set a default value for pick ticket swap restrictions. Slab specific will not allow a swap, Lot specific will allow a swap within the same lot, product specific will allow a swap within the same product name/color 352 - SPS_SO_PickTicketRestriction_Default_Value
_____ YES/NO	SO Activity	**Quantity Cannot be Edited in SO** This would restrict the quantity field from being edited for stock products in a SO. 353 - SPS_SO_StockProduct_Quantity_ReadOnly

Y/N/Value	Section	Switch/Description
_____ PRICE LEVEL/NO	SO Activity	Stock Product on SO set to Specific Price Level by Default ###This would restrict the quantity field from being edited for stock products on a SO. 354 - SPS_SO_StockProduct_FloorPriceLevel
_____ CITY/NO	Suppliers	Set Suppliers to a Default Location. Any new supplier would be set to your desired location by default. DefaultSupplierLocation

Static Data Migration File Formats

For static data migration Stone Profit Systems will be sending you Excel files listing the information needed for each item to be migrated. There will be an Excel file for each of the migration types listed below. With these files you will fill/paste your information in the designated columns. The following pages in this book have the data fields listed out with descriptions and examples to help you provide SPS with the appropriate information.

NOTE: Static data migration should be completed before training is scheduled.

COMPLETED	# OF ITEMS	STATIC MIGRATION TYPES
_____	_____	Chart of Accounts
_____	_____	Customers
_____	_____	Items/Products
_____	_____	Services
_____	_____	Suppliers
_____	_____	Vendors
_____	_____	Associates
_____	_____	Contacts
_____	_____	Price List
_____	_____	Tax Codes
_____	_____	Zip Codes

Chart of Accounts

FIELD NAME	DATA TYPE	LENGTH	DESCRIPTION/EXAMPLE
AccountNumber	AlphaNumeric	50	Numerical identifier for the account. *0136468444*
Account Name	AlphaNumeric	100	Descriptive name for the account. *Accounts Receivable*
Alternate Number	AlphaNumeric	50	Alternate numerical identifier for the account. *0136*
Alternate Name	AlphaNumeric	100	Alternate descriptive name for the account. *AR*
Account Type	AlphaNumeric	50	Defining the account type will determine how the account is used in the various parts of the system. Type of Account examples include: Expense, Income , Current Assets, Other Expense, etc. Value must be one of the following *Assets - Cash* *Assets - Bank* *Assets - Credit Card* *Assets - Accounts Receivable* *Assets - Fixed Assets* *Assets - Inventory* *Assets - Current Assets* *Assets - Other Current Assets* *Liabilities - Accounts Payable* *Liabilities - Current Liabilities* *Liabilities - Other Current Liabilities* *Liabilities - Long Term Liabilities* *Income - Sales Income* *Income - Other Income* *Expense - Cost Of Goods* *Expense - Accumulated Depreciation* *Expense - Operating Expense* *Expense - Other Expense* *Equity - Equity* *Equity - Retained Earnings*
Special Account Type	AlphaNumeric	50	The system is programmed to show certain accounts as options in specific parts of the system. Use the Data Value options to define how and where an account should show. Value must be one of the following *Credit Card* *Undeposited funds* *Freight Charges* *Inventory Adjustment* *Payroll Expenses* *Opening balance Equity* *Sales Tax payable* *Payroll Liabilities*

FIELD NAME	DATA TYPE	LENGTH	DESCRIPTION/EXAMPLE
mtBank Location	AlphaNumeric	500	Enter the city location of the your bank it should be the same as the cities listed for locations/profit centers *Chicago*
Is Default InType	AlphaNumeric	10	Enter “ON” if this is a default account for the special account type otherwise leave it blank *"on", ""*
mtParent Reference	AlphaNumeric	500	If accounts need to be grouped with other accounts, you will need to define the groups. Enter the name of the parent (group) account in this field. (For the accounts to be grouped the defined parent name must be typed in the exact same way.) *Accounts Receivable*
Sublevel	Integer		The level of the account in the accounting hierarchy *0, 1, 2, 4*
mtCurrency	AlphaNumeric	100	Enter the currency in which this account should function. *USD,INR,EURO*
Is Tax	AlphaNumeric	10	Enter “ON” if this Account is included in the Budget *"on", ""*
Is Budgeted	AlphaNumeric	10	If this account is a bank account enter the name of the bank. If it is not a bank account leave it blank. *"on", ""*
Bank Name	AlphaNumeric	50	If this account is a bank account enter the name of the branch. If it is not a bank account leave it blank. *Georgia Commerce*
Branch Name	AlphaNumeric	50	If this account is a bank account enter the name of the branch. If it is not a bank account leave it blank. *Chicago - Streeterville*
Manager	AlphaNumeric	50	If this account is a bank account enter the manager’s name for the Bank. If it is not a bank account leave it blank. *James Cathlic*
Phone Number	AlphaNumeric	15	If this account is a bank account enter the Phone number for the Bank. If it is not a bank account leave it blank. *"312-420-5010"*
Fax Number	AlphaNumeric	15	If this account is a bank account enter the Fax number for the Bank. If it is not a bank account leave it blank. *"773-527-2870"*

FIELD NAME	DATA TYPE	LENGTH	DESCRIPTION/EXAMPLE
Website	AlphaNumeric	50	If this account is a bank account enter the Web site for the Bank. If it is not a bank account leave it blank. *www.stoneprofits.com*
Swift Code	AlphaNumeric	50	If this account is a bank account enter the SWIFT code for Transactions made through this Bank. If it is not a bank account leave it blank. *BOFAIN4XMAA*
Routing Number	AlphaNumeric	50	If this account is a bank account enter the routing number for the Bank. If it is not a bank account leave it blank. *"121141822"*
Bank Account Number	AlphaNumeric	50	If this account is a bank account enter the Bank Account number. If it is not a bank account leave it blank. *"911987654321"*
Is Print Checks	AlphaNumeric	10	Enter "ON" if you need to be able to Print Checks from this Account *"on", ""*
Internal Notes	AlphaNumeric	1000	Enter any notes that you would like to have recorded in the system. *This account is used for Account Receivables*

Customers

FIELD NAME	DATA TYPE	LENGTH	DESCRIPTION/EXAMPLE
Name	AlphaNumric	150	This should include the full unique name of the Billing Customer/Company with spaces. *ABC Customer; 124 - Construction company.*
Code	AlphaNumric	50	CODE, ID, or Number used to quickly identify the customer. *ACTI01, C001351*
PrintName	AlphaNumric	150	Enter the name of the customer as it should appear on checks. This is usually a DBA or a secondary name of the company. *ABC Customer LLC*
LegacyID	AlphaNumric	50	Legacy ID is the ID/number designated for this customer in the previous system. *34, 1223*

FIELD NAME	DATA TYPE	LENGTH	DESCRIPTION/EXAMPLE
mtSubType	AlphaNumric	50	Enter a value that defines the business type of the customers. E.g..: Fabricator, Distributor, etc. *Fabricator, Contractor*
ContactName	AlphaNumric	50	Enter the name of the contact person for this company. *James Corby*
mtReferredby	AlphaNumric	150	Name of an existing customer that has referred this Customer to do business with you. *Stone Care LLC*
Phone1	AlphaNumric	50	Primary Phone number. *866-858-1915*
Phone2	AlphaNumric	50	Secondary Phone number. *866-858-1916*
Fax	AlphaNumric	50	Fax number. *773-527-2870*
Mobile	AlphaNumric	50	Mobile number of primary contact. *312-420-5010*
Email	AlphaNumric	100	Primary e-mail address. (enter only one) *customername@gmail.com*
URL	AlphaNumric	50	Web site address. *www.customerwebsite.com*
Address	AlphaNumric	50	Billing Address line 1 *3500 Almoa Ave.*
Address2	AlphaNumric	50	Billing Address line 2 *Suite W-10*
City	AlphaNumric	50	Billing City *Winter Park*
State	AlphaNumric	50	Billing State *FL*
Zip	AlphaNumric	10	Billing Zip Code *32792*
mtCountry	AlphaNumric	50	Billing Country *United States*
ShippingAddress	AlphaNumric	50	Shipping Address line 1 *7215 NW 41 STREET*

FIELD NAME	DATA TYPE	LENGTH	DESCRIPTION/EXAMPLE
ShippingAddress2	AlphaNumric	50	Shipping Address line 2 *UNIT G*
ShippingCity	AlphaNumric	50	Shipping City *Chicago*
ShippingState	AlphaNumric	50	Shipping State *FL*
ShippingZip	AlphaNumric	50	Shipping Zip Code *33166*
mtShippingCountry	AlphaNumric	50	Shipping Country *United States*
mtLocation	AlphaNumric	50	Enter one of your locations in which this customer primarily does business with. *Chicago*
IsMultiLocation	AlphaNumric	10	Enter "on" if this customer can be sold to from locations other than the customer's parent location. Leave blank if customer is only to be sold to from Parent Location. *"on"*
mtRoute	AlphaNumric	50	Enter a value that defines the general geographic location of this customer according to delivery routes. *Orlando - East*
mtSalesRepID	AlphaNumric	50	Enter name of the primary sales rep for this customer from your list of employees. *Carlos Riviera*
mtPriceLevel	AlphaNumric	50	Enter the price level that needs to be applied to most products sold to this customer. *Price6 - Price6*
mtPriceLevel2	AlphaNumric	50	Enter a secondary price level if some of your products have to be sold at a different price level to this customer. *Price5 - Price5*
mtPaymentTerms	AlphaNumric	50	Enter the default payment terms for this customer. *Net 30, Net 45, C.O.D*
mtSalesTax	AlphaNumric	50	Enter the default sales tax code for this customer. *COLUMBIA - 7%*
IsTaxExempt	AlphaNumric	10	Enter "on" if this Customer is Tax Exempt. Leave blank if customer is not tax exempt. *"on"*

FIELD NAME	DATA TYPE	LENGTH	DESCRIPTION/EXAMPLE
mtTaxExemptReason	AlphaNumric	50	Enter the reason for which this customer is tax exempt. *Reseller*
ExemptCretificateNo	AlphaNumric	50	Enter the customer's tax exempt certificate number if this Customer is Tax Exempt . Leave it blank if the customer is not tax exempt. *23-8012166927-5 12*
ExemptExpiryDate	AlphaNumric	50	Enter the date when the Customer's tax exempt status becomes invalid. *3/20/2020*
IsPORequired	AlphaNumric	10	Enter "on" if a PO# is required for all Sales Orders / Invoices created for this Customer. *"on"*
ApplyFinanceCharge	AlphaNumric	10	Enter "on" if the customer should be charged a finance charge if payment on any of their invoices exceeds their due date. *"on"*
Preferred Document Delivery Mode	AlphaNumric	50	Preferred contact method for this customer. *E-mail, Mail*
mtCurrency	AlphaNumric	50	Enter the default currency for transactions to this customer. *USD, EURO*
SinceDate	AlphaNumric	50	Enter the date since the customer has been setup in your system. *1/5/2005*
TaxNumber	AlphaNumric	50	Tax ID Number of the customer company. *32009547475*
mtLanguage	AlphaNumric	50	Preferred Language for interaction with this customer. *English*
CreditLimit	AlphaNumric	50	Maximum credit allowed for this customer. *50000.00*
PastDueAlert	AlphaNumric	150	Enter any message that shows up as an alert but still lets the users convert Sales orders to invoices. *This customer has past due*
LockAlert	AlphaNumric	150	Enter any message that shows up as an alert and locks down the users from converting Sale orders to invoices. *this customer is locked*

FIELD NAME	DATA TYPE	LENGTH	DESCRIPTION/EXAMPLE
IsAllowLogin	AlphaNumric	10	Enter "on" if you want to give this customer access to the Customer login module. *"on"*
Username	AlphaNumric	50	Enter this customer's Username for the customer login module. *john*
Password	AlphaNumric	50	Enter this customer's Password for the customer login module. *password*
DeliveryInstructions	AlphaNumric	1000	Enter the default delivery instructions for this customer. *Always pick up cash or check.*
InternalNotes	AlphaNumric	500	Enter notes for this customer meant for inter company communication. These notes do not print on any documents related to this customer. *Very difficult customer*

Items/Products

FIELD NAME	DATA TYPE	LENGTH	DESCRIPTION/EXAMPLE
ItemType	AlphaNumeric	50	Should be PRODUCT for all the Materials *Product*
SubItemType	AlphaNumeric	50	"The value for Sub-Item Type should be: - 'STOCK' for materials that are usually inventoried. - 'NON-STOCK' for materials that are not usually inventoried. - 'SUPPLIES' for materials that are not for sale, but are purchased as supplies/consumables for shop, showroom, office, etc." *Stock*
SKU	AlphaNumeric	50	Store Keeping Unit : Alphanumeric value or code of the material and is unique to every material. *ABS3*
Name	AlphaNumeric	150	Your selling name for this material - name must be unique based on selling price. *Absolute Black 3cm*
AlternateName	AlphaNumeric	150	Alternate name of the product is any additional name that is known to be used in the industry by suppliers or customer. *Black Absolute 3cm*

FIELD NAME	DATA TYPE	LENGTH	DESCRIPTION/EXAMPLE
mtProductForm	AlphaNumeric	50	This is the first level category of the products/materials. It is usually based on the shape/format of the Material. E.g. : SLAB , TILE, SINKS, FAUCETS, etc. (If dimensions are tracked in inventory the type must be defined as SLAB.) *SLAB, Tile*
mtServiceCategory	AlphaNumeric	50	This is the second level category of the product. It is usually based on the nature of the product/material. E.g. : Granite , Limestone, marble, travertine etc *Granite / Marble*
mtParentItem	AlphaNumeric	50	"If this product belongs to a family of products, A family name has to be setup and defined for each product within that family. E.g.: Absolute Black -- Family Name - Absolute Black 2cm -- Family member - Absolute Black 3cm -- Family member - Absolute Black 12x12 -- Family member..." *Absolute Black*
mtBaseColors	AlphaNumeric	50	This is the base color of the product. *Black / Aqua*
mtOrigin	AlphaNumeric	50	This is the country of origin from which this product was quarried or manufactured. *United States*
mtItemGroup	AlphaNumeric	50	This is an additional level of grouping for the products. *Staples / Exotics / Premium*
SeriesName	AlphaNumeric	50	This defines the product line/series that a product/item might belong to. *ABC*
mtPurchasingUnits	AlphaNumeric	50	Unit of measure in which this product is being purchased. *SF, Each, LF*
mtSellingUnits	AlphaNumeric	50	Unit of measure in which the product is being sold. *SF, Each, LF*
Selling Units Per Purchasing Units	AlphaNumeric	50	Number of selling units per purchasing unit. *1*
Weight	AlphaNumeric	50	Weight per unit in pounds. *4*
ProductSize	AlphaNumeric	50	Thickness of the product. *2CM*

FIELD NAME	DATA TYPE	LENGTH	DESCRIPTION/EXAMPLE
mtPickingUnit	AlphaNumeric	50	Unit of measure in which the product is being picked for a transaction. *box,bundle*
SellingUnitsPerPU	AlphaNumeric	50	Number of Selling Units per Picking Unit. *1*
IsIndivisibleItem	AlphaNumeric	50	Enter 'on' if you do not want to be able to sell partial quantities of inventory from each inventory line of this product. Must be ON for Slab. Typically it is left blank for tiles and other non slab items. *on*
mtPriceRange	AlphaNumeric	50	Enter a value based on how you define pricing groups. *Low, Medium, High, Level 1, Level 2, ...*
mtGLSalesAccount	AlphaNumeric	50	Enter the income account number which gets credited when this product is invoiced to a customer. *4010*
mtGL Inventory Account	AlphaNumeric	50	Enter the asset account that gets debited when this product is received into inventory. *1220*
mtGL Cost of Sales Account	AlphaNumeric	50	The Cost of Sales or COGS account that gets debited when this product is invoiced to a customer. *5000*
mtPreferredSupplier	AlphaNumeric	50	Enter the preferred supplier for this product. *ABC Granite & Marble*
SupplierSKU	AlphaNumeric	50	Supplier's SKU for this product. *ABCGM*
Supplier Product Name	AlphaNumeric	150	Name by which the supplier sells this product. *Black Absolute 3cm*
IsNewArival	AlphaNumeric	50	Enter "on" if this should be considered a NEW ARRIVAL in the system. If not, leave it Blank. *on*
ShowonWebsite	AlphaNumeric	50	Enter "on" if this product should be setup to show on your web site (web site connect module). Leave it blank if the product should NOT show. *on*
WebName	AlphaNumeric	50	Enter the name of the product as you want it to appear on your web site. *Absolute Black 3cm*

FIELD NAME	DATA TYPE	LENGTH	DESCRIPTION/EXAMPLE
Descriptionon Web site	AlphaNumeric	50	Enter any additional description that you want to display on the web site. *This gorgeous stone is black overall with khaki, brown and black mineral deposits.*
Notes	AlphaNumeric	50	Enter any additional notes for this product. *This product is in high demand.*
mtAlternateUOM1	AlphaNumeric	50	Alternate Unit of measure for the product. *CT*
UOMToSFConversion	Numeric	50	Conversion factor between the alternate UOM and square footage. *10*
UOM To Carton Conversion	Numeric	50	Conversion factor between the alternate UOM and a carton. *1*
UOM To Pallet Conversion	Numeric	50	Conversion factor between the alternate UOM and a pallet. *1*
Price1	Numeric	50	Level 1 selling price per UOM *10.75*
Price2	Numeric	50	Level 2 selling price per UOM *10.00*
Price3	Numeric	50	Level 3 selling price per UOM *9.75*
Price4	Numeric	50	Level 4 selling price per UOM *9.50*
Price5	Numeric	50	Level 5 selling price per UOM *9.25*
Price6	Numeric	50	Level 6 selling price per UOM *9.15*
Price7	Numeric	50	Level 7 selling price per UOM *9.00*
TaxStatus	AlphaNumeric	50	Enter "on" If the product should be taxable by default. Leave blank if not. *on*

FIELD NAME	DATA TYPE	LENGTH	DESCRIPTION/EXAMPLE
Consignment	AlphaNumeric	50	Enter 'on' if the product can be consigned to a Customer Location. Leave blank if not. *on*
IntroductionDate	Date	50	Date in which product was made available. *40756*
DiscontinueDate	Date	50	Date in which product will be discontinued. *2958465*
ProductOrigin	AlphaNumeric	50	Enter a value that defines the way the product was made part of your final inventory. E.g.: purchased, manufactured, fabricated, etc. *Manufactured*

Services

FIELD NAME	DATA TYPE	LENGTH	DESCRIPTION/EXAMPLE
ItemType	varchar(50)	50	Should be 'Service' for all services.' *Service*
SubItemType	varchar(50)	50	SPS Default - 'Service' *Service*
Name	varchar(150)	150	Name of the service. *Delivery Charges , Packing Fee etc*
SKU	varchar(50)	50	If this Service has any SKU associated with it, enter it here.
mtPurchasingUnits	varchar(50)	50	Selected from the list of Units by which this service can be purchased by *LF*
mtSellingUnits	varchar(50)	50	Selected from the list of Units by which this service can be sold by *LF*
mtServiceCategory	varchar(50)	50	"Enter a value that defines a category that this service belongs to. E.g.: Bullnose edge and Eased edge are in the category Edge Profiles" *Edge Profiles*

FIELD NAME	DATA TYPE	LENGTH	DESCRIPTION/EXAMPLE
mtGLSalesAccount	varchar(50)	50	Enter the income account number which gets credited when this service is invoiced to a customer. *Revenue Fabrication*
mtPreferredSupplier	varchar(50)	50	Preferred vendor for this service. *Contractors and CO*
AvgEstCost	numeric	50	This is the approximate cost for this service. *11.00*
Price1	numeric	50	Level 1 selling price per UOM *12.00*
Price2	numeric	50	Level 2 selling price per UOM *11.50*
Price3	numeric	50	Level 3 selling price per UOM *11.00*
Price4	numeric	50	Level 4 selling price per UOM *10.50*
Price5	numeric	50	Level 5 selling price per UOM *10.00*
Price6	numeric	50	Level 6 selling price per UOM *9.50*
Price7	numeric	50	Level 7 selling price per UOM *9.00*
mtPriceRange	varchar(50)	50	Enter a value based on how you define pricing groups. *Low/ Medium*
Frequentinso	varchar(50)	50	Mark this field 'on' if the service is frequently charged in Sale Orders / Invoices. *on*
Frequent in customer cm	varchar(50)	50	Mark this field 'on' if the service is frequently charged in Customer Credit Memos. *on*
Frequentinpo	varchar(50)	50	Mark this field 'on' if the service is frequently charged in Purchase Orders. *on*

FIELD NAME	DATA TYPE	LENGTH	DESCRIPTION/EXAMPLE
Frequent in supplier cm	varchar(50)	50	Mark this field 'on' if the service is frequently charged in Supplier Credit Memos. *on*
Notes	varchar(50)	500	Enter any additional notes for this service.

Suppliers

FIELD NAME	DATA TYPE	LENGTH	DESCRIPTION/EXAMPLE
Name	AlphaNumeric	150	This should include the full unique name of the Inventory Supplier/Company with spaces. *ABC Granite & Marble*
PrintName	AlphaNumeric	150	Enter the name of the supplier as it should appear on checks. This is usually a DBA or a secondary name of the company. *ABC Granite & Marble LLC*
Code	AlphaNumeric	50	CODE, ID, or Number used to quickly identify the inventory supplier. *ABCGM*
ContactName	AlphaNumeric	50	Enter the name of the contact person for this company. *Jason*
mtSubType	AlphaNumeric	50	Enter "domestic" or "international" depending on whether the inventory supplier is local or overseas. *ABC Granite & Marble*
mtLocation	AlphaNumeric	50	Enter one of your locations in which this supplier primarily does business with. *ABC Granite & Marble*
mtLanguage	AlphaNumeric	50	Preferred language for any interaction with the supplier. *English*
SinceDate	AlphaNumeric	50	Enter the date since the supplier has been setup in your system. *5/16/2010*
mtPort	AlphaNumeric	50	Enter the preferred port for any shipments from this Supplier. *Montreal*

FIELD NAME	DATA TYPE	LENGTH	DESCRIPTION/EXAMPLE
MarkupMultipliers	AlphaNumeric	10	Enter a value which the system uses to mark up the cost of products purchased from this supplier to calculate the selling price. *2.4*
Address	AlphaNumeric	50	Billing Address line 1 *445 E Ohio*
Address2	AlphaNumeric	50	Billing Address line 2 *Suite 350*
City	AlphaNumeric	50	Billing City *Chicago*
State	AlphaNumeric	50	Billing State *IL*
ZIP	AlphaNumeric	50	Billing Zip Code *60611*
mtCountry	AlphaNumeric	50	Billing Country *United States*
Phone1	AlphaNumeric	50	Primary Phone number. *312-828-0600*
Phone2	AlphaNumeric	50	Secondary Phone number. *312-828-0601*
Fax	AlphaNumeric	50	Fax number. *312-803-0012*
Mobile	AlphaNumeric	50	Mobile number of primary contact. *312-420-0377*
E-mail	AlphaNumeric	50	Primary e-mail address. (Enter only one) *support@stoneprofits.com*
URL	AlphaNumeric	50	Web site address. *www.stoneprofits.com*
TaxNumber	AlphaNumeric	50	Tax ID Number of the Supplier company. *52-4352452*

FIELD NAME	DATA TYPE	LENGTH	DESCRIPTION/EXAMPLE
mtCurrency	AlphaNumeric	50	Enter the default currency for transactions to this supplier. *USD*
mtPaymentTerms	AlphaNumeric	50	Enter the default payment terms for this supplier. *Net 30 ,COD*
mtShipmentTerms	AlphaNumeric	150	Enter the default shipment terms for this supplier. *FOB , CIP,CIF etc*
IsPrint1099	AlphaNumeric	5	Enter "on" if this Supplier needs to be printed a 1099. *on*
mtSalesTax	AlphaNumeric	50	Enter the default Sales tax Code for invoices from this Supplier if they charge any tax. *chicago / Tax Exempt*
InternalNotes	AlphaNumeric	500	Enter notes for this supplier meant for inter company communication. These notes do not print on any documents related to this customer.
IsAllowLogin	AlphaNumeric	5	Enter "on" if you want to give this supplier access to the supplier login module. *on*
Username	AlphaNumeric	50	Enter this supplier's Username for the supplier login module. *Jason*
Password	AlphaNumeric	50	Enter this supplier's Password for the supplier login module. *abcd*
LegacyID	AlphaNumeric		Legacy ID is the ID/number designated for this supplier in the previous system.

Vendors

FIELD NAME	DATA TYPE	LENGTH	DESCRIPTION/EXAMPLE
Name	AlphaNumeric	150	This should include the full unique name of the Vendor/ Company with spaces. *Amex Logistics*
PrintName	AlphaNumeric	150	Enter the name of the vendor as it should appear on checks. This is usually a DBA or a secondary name of the company. *Amex Logistics*
Code	AlphaNumeric	50	CODE, ID, or Number used to quickly identify the vendor. *Amex*
ContactName	AlphaNumeric	50	Enter the name of the contact person for this company. *John*
mtLocation	AlphaNumeric	50	Enter one of your locations in which this vendor primarily does business with. *Chicago*
Address	AlphaNumeric	50	Billing Address line 1 *445 E ohio*
Address2	AlphaNumeric	50	Billing Address line 2 *suit 350*
City	AlphaNumeric	50	Billing City *Chicago*
State	AlphaNumeric	50	Billing State *IL*
ZIP	AlphaNumeric	10	Billing Zip Code *60611*
mtCountry	AlphaNumeric	50	Billing Country *United States*
Phone1	AlphaNumeric	50	Primary Phone number. *312-828-0600*
Phone2	AlphaNumeric	50	Secondary Phone number. *312-828-0601*

FIELD NAME	DATA TYPE	LENGTH	DESCRIPTION/EXAMPLE
Fax	AlphaNumeric	50	Fax number. *773-527-2870*
Mobile	AlphaNumeric	50	Mobile number of primary contact. *312-420-5010*
E-mail	AlphaNumeric	50	Primary e-mail address. (Enter only one) *support@stoneprofits.com*
URL	AlphaNumeric	50	Web site address. *www.stoneprofits.com*
mtPaymentTerms	AlphaNumeric	50	Enter the default payment terms for this customer. *30 Days / COD*
mtGLAccount	AlphaNumeric	100	Enter the number for the default Expense Account on all Bills that are entered for this Vendor. *3520*
AccountNumber	AlphaNumeric	50	Enter your account number with this Vendor. *1054789*
TaxNumber	AlphaNumeric	50	Tax ID Number of the vendor company. *52-4352452*
mtCurrency	AlphaNumeric	50	Enter the default currency for transactions to this vendor. *USD*
CheckMemo	AlphaNumeric	500	Enter the sentence or phrase that needs to be printed on checks towards this Vendor. *Amex Logistics*
IsPrint1099	AlphaNumeric	50	Enter "on" if this vendor needs to be printed a 1099. *on*
IsFreightVendor	AlphaNumeric	50	Enter "on" if bills from this vendor need to be linked to a supplier packing list for the system to auto-calculate the unit landed cost. *on*
IsSalesTAxAuthority	AlphaNumeric	50	Enter "on" if this vendor is a Sales tax Authority. *on*
IsSubContractor	AlphaNumeric	50	Enter "on" if this vendor is a Sub-contractor. *on*

FIELD NAME	DATA TYPE	LENGTH	DESCRIPTION/EXAMPLE
InternalNotes	AlphaNumeric	500	Enter notes for this vendor meant for inter company communication. These notes do not print on any documents related to this vendor.

Associates

FIELD NAME	DATA TYPE	LENGTH	DESCRIPTION/EXAMPLE
Name	AlphaNumeric	150	This should include the full unique name of the associate or third party company with spaces. *Mark Albert*
Code	AlphaNumeric	50	CODE, ID, or Number used to quickly identify the associate or third party. *ABI001*
mtSubType	AlphaNumeric	50	Enter a value that defines the business type of the associate. E.g.: Architect , Designer, Contractor etc. *CONTRACTOR*
ContactName	AlphaNumeric	50	Enter the name of the contact person for this company. *Mark Albert*
Phone1	AlphaNumeric	50	Primary Phone number. *312-828-0505*
Phone2	AlphaNumeric	50	Secondary Phone number. *312-828-0506*
Fax	AlphaNumeric	50	Fax number. *312-803-0012*
Mobile	AlphaNumeric	50	Mobile number of primary contact. *312-420-5020*
E-mail	AlphaNumeric	50	Primary e-mail address. (Enter only one) *mark@gmail.com*
URL	AlphaNumeric	50	Web site address. *www.websitename.com*
Address	AlphaNumeric	50	Billing Address line 1 *1450 Madruca Ave.*

FIELD NAME	DATA TYPE	LENGTH	DESCRIPTION/EXAMPLE
Address2	AlphaNumeric	50	Billing Address line 2 *Suite 400*
City	AlphaNumeric	50	Billing City *Coral Gables*
State	AlphaNumeric	50	Billing State *FL*
Zip	AlphaNumeric	10	Billing Zip Code *33146*
mtCountry	AlphaNumeric	50	Billing Country *United States*
InternalNotes	AlphaNumeric	500	Enter notes for this associate meant for inter company communication. These notes do not print on any documents related to this customer.

Contacts

FIELD NAME	DATA TYPE	LENGTH	DESCRIPTION/EXAMPLE
mtParty	AlphaNumeric	50	This should include the full unique name of the Customer/ Supplier/Vendor with spaces. *American Granite & Marble*
PartyType	AlphaNumeric	50	Enter the type of the party for which this is a contact. Only possible values are Customer, Supplier, or Vendor *Customer*
Title	AlphaNumeric	50	Enter the title for the contact. *Mr.*
Name	AlphaNumeric	50	Enter the full name of the contact. *Mark Albert*
Address	AlphaNumeric	50	Address line 1 *7215 NW 41 Street*
Address2	AlphaNumeric	50	Address line 2 *Unit G*

FIELD NAME	DATA TYPE	LENGTH	DESCRIPTION/EXAMPLE
City	AlphaNumeric	50	City *Chicago*
State	AlphaNumeric	50	State *FL*
Zip	AlphaNumeric	10	Zip Code *33166*
mtCountry	AlphaNumeric	50	Country *United States*
Phone1	AlphaNumeric	50	Primary Phone number. *866-858-1915*
Phone2	AlphaNumeric	50	Secondary Phone number. *866-858-1916*
Fax	AlphaNumeric	50	Fax number. *773-527-2870*
E-mail	AlphaNumeric	50	E-mail address of the contact. *contactname@gmail.com*
IsShipToAddress	AlphaNumeric	50	Enter 'on' if this contact is actually a secondary shipping address. *on*
mtTaxCode	AlphaNumeric	50	Enter the tax code of the contact. *BREVARD*
InternalNotes	AlphaNumeric	500	Enter notes for this customer meant for inter company communication. These notes do not print on any documents related to this contact.

Price List

FIELD NAME	DATA TYPE	LENGTH	DESCRIPTION/EXAMPLE
mtName	AlphaNumeric	150	Enter the name of the product which matches with the name of the product in the Item master list. *Absolute black 3cm*
mtSKU	varchar(50)	50	Store Keeping Unit : Alphanumeric value or code of the material. The value should match to the SKU's in the item master list. *ABS3*
mtLegacySKU	varchar(150)	150	SKU of the material in the previous database or system
Price1	money		Level 1 selling price per UOM *15.00*
Price2	money		Level 2 selling price per UOM *14.00*
Price3	money		Level 3 selling price per UOM *13.00*
Price4	money		Level 4 selling price per UOM *12.00*
Price5	money		Level 5 selling price per UOM *11.00*
Price6	money		Level 6 selling price per UOM *10.00*
Price7	money		Level 7 selling price per UOM *9.00*
Price8	money		Level 8 selling price per UOM *8.00*
Price9	money		Level 9 selling price per UOM *7.00*
Price10	money		Level 10 selling price per UOM *6.00*

Tax Codes

FIELD NAME	DATA TYPE	LENGTH	DESCRIPTION/EXAMPLE
SortOrder	Integer		Enter the sequential order in which you want this tax code to show up in the drop down. *10*
Code	AlphaNumeric	50	Enter a value for the Sales Tax Code that you want to see in the sales tax drop down. *IL*
Label	AlphaNumeric	50	Enter a label or title for the Sales Tax Code. *Illinois*
City	AlphaNumeric	100	Enter the name of the city for this tax code. *Chicago*
County	AlphaNumeric	50	Enter the name of the county for this tax code. *Cook*
State	AlphaNumeric	10	Enter the state for this tax code. *IL*
Zip	AlphaNumeric	15	Enter the zip code for this tax code. *60611*
IsPurchaseTax	AlphaNumeric	10	Please enter "ON" if this is a Purchase Tax too or leave Blank *on*
IsSalesTax	AlphaNumeric	10	Please enter "ON" if this is a Sales Tax too or leave Blank *on*
IsUseTax	AlphaNumeric	10	Please enter "ON" if this is a Active Tax too or leave Blank *on*
mtTaxItem	AlphaNumeric	50	Tax Item is the same as Sales Tax Code if the Sales tax is made of only one component. If the Sales Tax Code is made of multiple components then we need the different tax components as multiple Tax Items in multiple lines in this migration file. E.g. : Sales Tax could include City Tax and County Tax. ****###*
TaxItemID	Integer		This is the ID for the Tax Items. SPS will take care of this.

FIELD NAME	DATA TYPE	LENGTH	DESCRIPTION/EXAMPLE
Rate	Numeric		Rate is the tax percentage for this tax code. *7%*
EffectiveDate	smalldatetime		Date from which this tax code is effective. *3/1/2013*

Price List

FIELD NAME	DATA TYPE	LENGTH	DESCRIPTION/EXAMPLE
ZipCode	AlphaNumeric	20	Zip code value. *60611*
mtTaxCodeID	AlphaNumeric	50	Tax code for this Zip code value. *IL*

Training Agenda

The training agenda will help you in scheduling and organizing the training sessions with SPS. Use the descriptions to decide who should be a part of each session. Also, use this section to write down the date and times that you have scheduled with SPS's Training Rep.

Note: *Static data migration must be completed before training begins.*

DATE/TIME	PARTICIPANTS/USERS	DESCRIPTION
____ /___/___ _____:_____	_____ _____ _____	**Administration and Setup** This session is intended for users that will be performing administrative/management tasks. • System Setup • User Admin • Admin Tools
____ /___/___ _____:_____	_____ _____ _____ _____ _____	**Purchasing & Master List** This session is intended for users that will be performing operational tasks such as purchasing Inventory, product and services management, as well as suppliers and vendors. • Product Master List • Supplier and Vendor Info • Purchasing Flow • Purchase Orders • Supplier Invoice/ Packing Lists • Freight Bills

DATE/TIME	PARTICIPANTS/USERS	DESCRIPTION
Call 1: ____ /___/____ _____ : _____ Call 2: ____ /___/____ _____ : _____	_____ _____ _____ _____ _____ _____ _____	**Inventory** This session will include information pertaining to inventory management • Product Master List • Inventory Search • Transfers • Physical Count • Inventory Adjustment
Call 1: ____ /___/____ _____ : _____ Call 2: ____ /___/____ _____ : _____	_____ _____ _____ _____ _____ _____ _____	**Pre-Sales** This session will be for users who will be a part of building quotations, creating holds, and managing sample orders. • Opportunities • Customer Visits • Sample Orders • Quotations • Inventory Holds • Products • Services and Packages
Call 1: ____ /___/____ _____ : _____ Call 2: ____ /___/____ _____ : _____ Call 3: ____ /___/____ _____ : _____	_____ _____ _____ _____ _____ _____ _____ _____ _____	**Sales** This session is intended for your sales representatives, and will go over sales orders and invoicing. • Sales Home • Customers and Products • Sale Orders • Dashboards • Pick Tickets • Packing List • Returns • Invoices

DATE/TIME	PARTICIPANTS/USERS	DESCRIPTION
Call 1: ____ /___/____ _____:_____ Call 2: ____ /___/____ _____:_____	_____ _____ _____ _____ _____ _____	## Scheduling Calendars and scheduling will be discussed in this training session. • Scheduling Home • Dashboards • Calendar Views • Resources • Events & Event Types • Daily Agenda
____ /___/____ _____:_____	_____ _____ _____ _____	## Accounting & Reports This session will in compass the accounting module and reports. • Accounts Receivable • Accounts Payable • Banking • General Ledger • Print Checks • Bank Reconciliation • Journal Entries

Print Formats (Common)

The following pages show examples of the printed documents that come from Stone Profit Systems. Please review these examples to make sure they will work for your company. If you have any changes or suggestions, mark/draw them directly on the examples. Once you have made the changes make a copy/scan and send it to your SPS contact.

Note: *The examples are not to scale, make changes based on information placement.*
Note II: *If there is a document not seen here please send us a copy to setup.*

- Purchase Order
- Receiving Worksheet
- Transfer Order
- Sale Order
- Pick Ticket
- Packing List
- Invoice
- Deposit Slip

Stone Profit Systems

Stone Profits Demo
445 E Ohio Street 350
Chicago, IL 60611
P: 866-858-1915 F: 312-803-0012

Purchase Order#: 4

August 22, 2013

printed on Tuesday, September 24, 2013 08:54 am

Supplier:
LMN Granites
794B South West Street B6
Rio
Brazil

ShipTo:
Stone Profits Demo
445 E Ohio Street 350
Chicago IL 60611
United States

Shipment Terms	Payment Terms	Required Ship Date	Entered By
	30 Days		**administrator**

Description	Slabs	Quantity	Unit Price	Extended
Alaska White 3cm		1,500.00 KM	$15.00	$22,500.00
Uba Tuba 3CM		1,200.00 SF	$14.50	$17,400.00

Sub Total: $39,900.00

Tax: $0.00

Total: $39,900.00

Approved By: _____

Stone Profit Systems

Stone Profits Demo
445 E Ohio Street 350
Chicago, IL 60611
P: 866-858-1915 F: 312-803-0012

Receiving Worksheet #: 3

August 21, 2013

printed on Tuesday, September 24, 2013 08:58 am

Received At:
Stone Profits Demo
445 E Ohio Street 350
Chicago IL 33172
United States

Invoice #	PO #	Container #
	3	

Material	Slabs/Pieces	Quantity
Crema Bordeaux 3CM	**49**	**2,563.54 SF**

Serial Num	Lot/Block	Bundle	Spp. Ref	Invoiced Size	Measured Area	Notes	Bin	Net SF
3-1				110" X 68" = 51.94 SF	_____x_____ = _____		BAY4	_____
3-2				110" X 68" = 51.94 SF	_____x_____ = _____		BAY4	_____
3-3				110" X 68" = 51.94 SF	_____x_____ = _____		BAY4	_____
3-4				110" X 68" = 51.94 SF	_____x_____ = _____		BAY4	_____
3-5				110" X 68" = 51.94 SF	_____x_____ = _____		BAY4	_____
3-6				110" X 68" = 51.94 SF	_____x_____ = _____		BAY4	_____
3-7				110" X 68" = 51.94 SF	_____x_____ = _____		BAY4	_____
3-8				110" X 68" = 51.94 SF	_____x_____ = _____		BAY4	_____
3-9				110" X 68" = 51.94 SF	_____x_____ = _____		BAY4	_____
3-10				110" X 68" = 51.94 SF	_____x_____ = _____		BAY4	_____
3-11				110" X 68" = 51.94 SF	_____x_____ = _____		BAY4	_____
3-12				110" X 68" = 51.94 SF	_____x_____ = _____		BAY4	_____
3-13				110" X 68" = 51.94 SF	_____x_____ = _____		BAY4	_____
3-14				110" X 68" = 51.94 SF	_____x_____ = _____		BAY4	_____
3-15				110" X 68" = 51.94 SF	_____x_____ = _____		BAY4	_____
3-16				110" X 68" = 51.94 SF	_____x_____ = _____		BAY4	_____
3-17				110" X 68" = 51.94 SF	_____x_____ = _____		BAY4	_____
3-18				110" X 68" = 51.94 SF	_____x_____ = _____		BAY4	_____
3-19				110" X 68" = 51.94 SF	_____x_____ = _____		BAY4	_____
3-20				110" X 68" = 51.94 SF	_____x_____ = _____		BAY4	_____
3-21				110" X 68" = 51.94 SF	_____x_____ = _____		BAY4	_____
3-22				110" X 68" = 51.94 SF	_____x_____ = _____		BAY4	_____

Received By:_____

Date:_____

Stone Profit Systems

Stone Profits Demo
445 E Ohio Street 350
Chicago, IL 60611
P: 866-858-1915 F: 312-803-0012

Transfer - Pick Ticket #: 1

August 22, 2013

printed on Tuesday, September 24, 2013 09:00 am

Transferred From:
Stone Profits Demo
445 E Ohio Street 350
Chicago
P: 866-858-1915
F: 312-803-0012
F: support@stoneprofits.com

Transferred To:
Stone Profits Demo2
123 Demo Road
Milw aukee
P: 312-828-0601
F: 312-803-0012
F: support@stoneprofits.com

PriceLevel	Invoice Date	Ship(B/L) Date
Price6	**Aug 22, 2013**	

Description	SKU	Slabs	Quantity
Absolute Black Polished 3CM		**1**	**55.00 SF**

Serial Num	Barcode Num	Lot/Block	Bundle	Quantity	ReMeasure
1-4	DT15	123		110" X 72" = 55.00 SF	_____ X _____

Description	SKU	Slabs	Quantity
Uba Tuba 3CM		**1**	**55.10 SF**

Serial Num	Barcode Num	Lot/Block	Bundle	Quantity	ReMeasure
1-57	DT68	552		115" X 69" = 55.10 SF	_____ X _____

Description	SKU	Slabs	Quantity
Alaska White 3cm		**2**	**56.78 SF**

Serial Num	Barcode Num	Lot/Block	Bundle	Quantity	ReMeasure
1-87	DT98	6656		112" X 73" = 56.78 SF	_____ X _____
1-88	DT99	6656		112" X 73" = 56.78 SF	_____ X _____

Notes:
Sample Inventory Transfer

Picked By:_____

Stone Profit Systems

Stone Profits Demo
445 E Ohio Street 350
Chicago, IL 60611
P: 866-858-1915 F: 312-803-0012

SaleOrder#: 13

Aug 23, 2013

printed on Tuesday, September 24, 2013 09:13 am

Bill To:
XYZ Customer
799 Opal Blvd
Chicago IL 60611 United States
P: 789-456-3322 / F: 789-456-4564
E: Glenn@xyzcustomer.com

ShipTo:
XYZ Customer
799 Opal Blvd
Chicago IL 60611
P: 789-456-3322 / F: 789-456-4564

Sales Rep 1	PO #	Delivery Type	Job Name
administrator		**Delivery**	

Sales Rep 2	Freight Carrier	Payment Terms
		90 days

SKU	Description	Quantity	Unit Price	Extended
	Uba Tuba 3CM	**181.26 SF**	**$18.50**	**$3,353.31**

Serial Num	Barcode Num	Lot/Block	Bundle	Quantity
1-78	QP278	323232		116" X 75" = 60.42 SF
1-79	QP279	323232		116" X 75" = 60.42 SF
1-80	QP280	323232		116" X 75" = 60.42 SF

Terms and Conditions:

Sample Stone Co. warrants that: (i) it will provide its services hereunder in a professional and workmanlike manner; and (ii) the third parties with which it contracts to assist it in obtaining respondents for surveys are required by their agreements with Sample Stone Co. to comply with the federal CAN-SPAM Act. WITH THE EXCEPTION OF THE PRECEDING WARRANTY, Sample Stone Co. MAKES NO WARRANTY WITH RESPECT TO ANY MATTER INCLUDING, WITHOUT LIMITATION, ITS SERVICES AND DELIVERABLES HEREUNDER, AND EXPRESSLY DISCLAIMS ALL OTHER WARRANTIES, EXPRESS OR IMPLIED,

INCLUDING, WITHOUT LIMITATION, THE IMPLIED WARRANTIES OF NONINFRINGEMENT, TITLE, MERCHANTABILITY, FITNESS FOR ANY PARTICULAR PURPOSE, AND ANY REPRESENTATION OR WARRANTY REGARDING THE PERFORMANCE, AVAILABILITY OR FUNCTIONALITY OF ANY ASPECT OF THE SERVICES OR DELIVERABLES HEREUNDER.

Sub Total: $3,353.31

Tax(ALACHUA -ALACHUA 6%): $201.20

Total: $3,554.51

Balance Due: $3,554.51

Stone Profit Systems

Stone Profits Demo
445 E Ohio Street 350
Chicago, IL 60611
P: 866-858-1915 F: 312-803-0012

PickTicket #: 10009

August 23, 2013

printed on Tuesday, September 24, 2013 09:15 am

Bill to:
XYZ Customer
799 Opal Blvd
Chicago IL 60611
P: 789-456-3322 / F: 789-456-4564
F: Glenn@xyzcustomer.com

ShipTo:
XYZ Customer
799 Opal Blvd
Chicago IL 60611
P: 789-456-3322 / F: 789-456-4564

Sales Rep 1	PO #	Delivery Type	Job Name
administrator		**Delivery**	

Sales Rep 2	Freight Carrier	SO #
		13

SKU	Description	Restriction	Quantity
	Uba Tuba 3CM	**Slab**	**181.26 SF**

Serial Num	Barcode Num	Lot/Block	Bundle	Quantity
1-80	QP280	323232		116" X 75" = 60.42 SF
1-79	QP279	323232		116" X 75" = 60.42 SF
1-78	QP278	323232		116" X 75" = 60.42 SF

Pulled By:_____

Checked By:_____

Date:_____

Stone Profit Systems

Stone Profits Demo
445 E Ohio Street 350
Chicago, IL 60611
P: 866-858-1915 F: 312-803-0012

Packinglist #: 10002

August 20, 2013

printed on Tuesday, September 24, 2013 09:19 am

Bill to:
Za Zing Fabrications
4468 Grand Ave Unit 5B
Chicago IL 60625
P: 312-456-7897 / F: 312457878
F: info@zazing.com

ShipTo:
Za Zing Fabrications

Sales Rep 1	PO #	Delivery Type	Job Name	SO #
administrator		**Delivery**		**6**

Sales Rep 2	Freight Carrier	Payment Terms
	ABC Courier	**Check/Cashiers Ck/Credit Card/Telecheck**

SKU	Description	Quantity	Unit Price	Extended
	Alaska White 3cm	**56.00 SF**	**$15.00**	**$840.00**

Serial Num	Barcode Num	Lot/Block	Bundle	Quantity
1-115	DT126	6653		112" X 72" = 56.00 SF

Terms and Conditions:

Sample Stone Co. warrants that: (i) it will provide its services hereunder in a professional and workmanlike manner; and (ii) the third parties with which it contracts to assist it in obtaining respondents for surveys are required by their agreements with Sample Stone Co. to comply with the federal CAN-SPAM Act. WITH THE EXCEPTION OF THE PRECEDING WARRANTY, Sample Stone Co. MAKES NO WARRANTY WITH RESPECT TO ANY MATTER INCLUDING, WITHOUT LIMITATION, ITS SERVICES AND DELIVERABLES HEREUNDER, AND EXPRESSLY DISCLAIMS ALL OTHER WARRANTIES, EXPRESS OR IMPLIED, INCLUDING, WITHOUT LIMITATION, THE IMPLIED WARRANTIES OF NONINFRINGEMENT, TITLE, MERCHANTABILITY, FITNESS FOR ANY PARTICULAR PURPOSE, AND ANY REPRESENTATION OR WARRANTY REGARDING THE PERFORMANCE, AVAILABILITY OR FUNCTIONALITY OF ANY ASPECT OF THE SERVICES OR DELIVERABLES HEREUNDER.

Sub Total: $882.40

Tax(ALACHUA -ALACHUA 6%): $50.40

Total: $932.80

Check#: 10000: $200.00

Balance Due: $732.80

Customer:_____

Signature:_____

Date:_____

Stone Profit Systems

Stone Profits Demo
445 E Ohio Street 350
Chicago, IL 60611
P: 866-858-1915 F: 312-803-0012

Invoice #: 10003

August 23, 2013

printed on Tuesday, September 24, 2013 09:21 am

Bill to:
Bloomers Construction
137 Batavia St
Benton IL 95266
P: 700-805-8052 / F: 700-805-8055
F: Benton@bloomersconstuction.com

ShipTo:
Bloomers Construction
137 Batavia St
Benton IL 95266
P: 700-805-8052 / F: 700-805-8055

Sales Rep 1	PO #	Delivery Type	Job Name	SO #
administrator		**Delivery**		**21**

Sales Rep 2	Freight Carrier	Payment Terms	Due Date
		90 days	**11/21/2013**

SKU	Description	Quantity	Unit Price	Extended
	Crema Bordeaux 3CM	**103.88 SF**	**$19.00**	**$1,973.72**

Serial Num	Barcode Num	Lot/Block	Bundle	Quantity
3-23	QP376			110" X 68" = 51.94 SF
3-24	QP377			110" X 68" = 51.94 SF

Terms and Conditions:

Sample Stone Co. warrants that: (i) it will provide its services hereunder in a professional and workmanlike manner; and (ii) the third parties with which it contracts to assist it in obtaining respondents for surveys are required by their agreements with Sample Stone Co. to comply with the federal CAN-SPAM Act. WITH THE EXCEPTION OF THE PRECEDING WARRANTY, Sample Stone Co. MAKES NO WARRANTY WITH RESPECT TO ANY MATTER INCLUDING, WITHOUT LIMITATION, ITS SERVICES AND DELIVERABLES HEREUNDER, AND EXPRESSLY DISCLAIMS ALL OTHER WARRANTIES, EXPRESS OR IMPLIED, INCLUDING, WITHOUT LIMITATION, THE IMPLIED WARRANTIES OF NONINFRINGEMENT, TITLE, MERCHANTABILITY, FITNESS FOR ANY PARTICULAR PURPOSE, AND ANY REPRESENTATION OR WARRANTY REGARDING THE PERFORMANCE, AVAILABILITY OR FUNCTIONALITY OF ANY ASPECT OF THE SERVICES OR DELIVERABLES HEREUNDER.

Sub Total: $1,973.72

Tax(ALACHUA -ALACHUA 6%):

$118.42

Total: $2,092.14

Balance Due: $2,092.14

Stone Profit Systems

Stone Profits Demo
445 E Ohio Street 350
Chicago, IL 60611
P: 866-858-1915 F: 312-803-0012

Deposit #:500

May 17, 2013

printed on Wednesday, May 29, 2013 10:50 am

Checking Account:
000-10 - Cash

Date	Party Name	Method	Check / Ref #	Total
Oct 22, 2012	Freight Company	Check	3	$3,000.00
Oct 26, 2012	Test Supplier	Check	13	$9,924.30
Nov 08, 2012	AAA COOPER	Check	41	$50.00
Nov 08, 2012	AAA COOPER	Check	42	$100.00

Total: $13,074.30

Print Formats (Distributors)

This section of print formats shows only those pertaining to distributors. Please review these examples to make sure they will work for your company. If you have any changes or suggestions, mark/draw them directly on the examples. Once you have made the changes make a copy/scan and send it to your SPS contact.

Note: *The examples are not to scale, make changes based on information placement.*
Note II: *If there is a document not seen here please send us a copy to setup.*

- Hold Letter Homeowner
- Hold Letter Fabricator
- Pre-Purchase Request

Stone Profit Systems

Stone Profits Demo
445 E Ohio Street 350
Chicago, IL 60611
P: 866-858-1915 F: 312-803-0012
www.stoneprofits.com

Hold #: 6

Aug 23, 2013

printed on Tuesday, September 24, 2013 09:28 am

Bill To:
ABC Customer
412 Chicago Ave.
Unit 2B
Chicago Il 60644
United States
P: 312-456-7894
F: 312-987-6545
E: info@abccustomer.com

Job / Home Owner:
United States

Job / Home Owner	Expiry Date	Sales Rep	Sales Tax
	Sep 27, 2013	**administrator**	**ALACHUA -ALACHUA 6%**

Architect	Designer	General Contractor	Referred By

Thank you for visiting our facility recently. You have made a selection of the following material during your visit. We appreciate your business!

Description	Quantity
Uba Tuba 3CM ()	**55.10 SF**

Serial Num	Barcode Num	Lot/Block	Bundle	Spp. Ref	Quantity
1-62	DT73	552			115" X 69" = 55.10 SF

Description	Quantity
Uba Tuba 3CM ()	**55.10 SF**

Serial Num	Barcode Num	Lot/Block	Bundle	Spp. Ref	Quantity
1-63	DT74	552			115" X 69" = 55.10 SF

Slabs will be held for 10 Days without payment. We will continue to hold slabs up to 60 Days with full payment. After 60 days, slabs will be returned to inventory and customers will be credited 90% of the payment.

Stone Profit Systems

Stone Profits Demo
445 E Ohio Street 350
Chicago, IL 60611
P: 866-858-1915 F: 312-803-0012
www.stoneprofits.com

Hold #: 6

Aug 23, 2013

printed on Tuesday, September 24, 2013 09:32 am

Bill To:
ABC Customer
412 Chicago Ave.
Unit 2B
Chicago Il 60644
United States
P: 312-456-7894
F: 312-987-6545
E: info@abccustomer.com

Job / Home Owner:
United States

Job / Home Owner	Expiry Date	Sales Rep	Sales Tax
	Sep 27, 2013	**administrator**	**ALACHUA -ALACHUA 6%**

Architect	Designer	General Contractor	Referred By

Your customer recently visited our facility and made a visual selection of the following material:

Description	Quantity	Unit Price	Extended
Uba Tuba 3CM ()	**55.10 SF**	**$15.00**	**$826.50**

Serial Num	Barcode Num	Lot/Block	Bundle	Spp. Ref	Quantity
1-62	DT73	552			115" X 69" = 55.10 SF

Description	Quantity	Unit Price	Extended
Uba Tuba 3CM ()	**55.10 SF**	**$15.00**	**$826.50**

Serial Num	Barcode Num	Lot/Block	Bundle	Spp. Ref	Quantity
1-63	DT74	552			115" X 69" = 55.10 SF

Please send us a P.O. confirming the exact number of slabs you will require for this project. We appreciate your business!

Sub Total: $1,653.00

Tax(ALACHUA -ALACHUA 6%): $99.18

Total: $1,752.18

Stone Profit Systems

Stone Profits Demo
445 E Ohio Street 350
Chicago, IL 60611
P: 866-858-1915 F: 312-803-0012

Pre-Purchase Request - 15

May 28, 2013

printed on Tuesday, May 28, 2013 02:31 pm

Supplier:
LMN Granites
794B South West Street B6
Rio
Brazil

Requested By:
administrator

Product	Product SKU	Bundles	Slabs	Quantity	UOM
Colonial Gold 8x8 Polished	CG1599			600.00	SF
Colonial Gold 12x 12Polished	CG1598			600.00	SF

Pre-Purchase Terms:

Pre Purchase Terms Sample Pre Purchase to make sure they show up in the Pre Purchase Request form that prints after selecting the products and filling in the qty or slabs or bundles in the previous page.

Print Formats (Fabricators)

This section of print formats shows only those pertaining to fabricators. Please review these examples to make sure they will work for your company. If you have any changes or suggestions, mark/draw them directly on the examples. Once you have made the changes make a copy/scan and send it to your SPS contact.

Note: *The examples are not to scale, make changes based on information placement.*
Note II: *If there is a document not seen here please send us a copy to setup.*

- Quote
- Install Schedule

Stone Profit Systems

Stone Profits Demo
445 E Ohio Street 350
Chicago, IL 60611
P: 866-858-1915 F: 312-803-0012

Quote#: 4 - 1

August 21, 2013

printed on Tuesday, September 24, 2013 09:58 am

Job Name: **Jane Doe** 1200 East Drive Chicago IL 60623 United States
P: 773-564-4544, ssF: 773-556-4464, E: Jane@gmail.com

Billing:
Bobs Builders
1522 East Maple St
Willbure IL 62333
United States
P: 4585522331
F: 4585522333
E: bnicks@bobsbuilders.com

Delivery
1234 Wood Street 1
Chicago IL 60606

Sales Rep	Payment Terms	Delivery Type	Project Type	Price Level
administrator	**90 days**	**Delivery**	**Residential - Remodel**	**RET**

Architect	Designer	General Contractor	Builder	Brand

Description	Quantity	Unit Price	Extended
Standard Install		$0.00	$0.00
01	1.00 EA	$50.00	$50.00
Absolute Black 2CM	53.00 SF	$20.00	$1,060.00
1120 Round Sink	1.00 EA	$50.00	$50.00
Capri Lime Stone	1.00 EA	$75.00	$75.00

Notes:
Walk In Quote

Sub Total: $1,235.00

Tax(SANTA ROSA -SANTA ROSA 6.5%): $77.03

Total: $1,312.03

Your savings on this quotation are $0.00

Bar-Code Labels

This section will discuss the information you need to start printing bar-codes for your inventory as soon as possible.

- Recommended Media/Printer
- Bar-Code Setup
- Bar-Code Printout Example *Note: Example is not to scale.*

Recommended Media/Printer

Bar-code Sheet Media

SPS offers a plastic tag material in letter size that has 22 pre-cut labels per sheet. Bar-codes can be printed on to media using any office laser printer.

Laser Printers

SPS recommends the use of any laser printer. It can be black and white or color. Laser Printers are recommended for the speed in which documents can be printed, and because the ink/toner does not smear on media.

Smart Label Printer 440

Seiko Instruments USA Inc.
labelprinters.sii-thermalprinters.com

Bar-Code Setup

Product Type Label Templates

Barcode label templates can be set up for each product type (Slab, Tile, Prefab, etc.) that you define in the system setup. The system also allows you to set multiple product types to one template. Each template can show different information or be set to print differently.

Configure Printed Information

SPS gives you the ability to configure the information you want to show on each barcode. See the list below to see what information can be put on the bar-code labels.

_____ SKU
_____ Quantity
_____ Unique ID
_____ Product Name
_____ Bar-Code ID#
_____ Lot #
_____ Size/Dimensions
_____ Bundle #
_____ Company Logo
_____ Supplier Reference #
_____ Picking Units
_____ Packaging Details
_____ Supplier Code

Print Setup

The print setup determines how the bar-codes will print onto the desired media. The following information is the setup for Stone Profit System's bar-code label media (example on the next page). If you choose to use a different media these are the configurations that can be adjusted.

Note: The alignment of the print out to the bar-code sheet may vary from printer to printer. Some minor adjustments may need to be made.

8.5 Paper/Sheet Width
11 Paper/Sheet Height
.75 Paper/sheet Top Margin
.375 Paper/sheet Left Margin
2 Columns Per Page
1 Rows Per Page
0 Space Between Columns
.125 Space Between Rows
3.875 Label Width
.75 Label Height
.125 Left and top margins (within label)
150 Number of Characters on Label
30 Barcode height (in pixels)
65 Logo Size (in pixels)

1 - 1/ (123)/ Absolute Black Polished 3CM

1 - 2/ (123)/ Absolute Black Polished 3CM

1 - 3/ (123)/ Absolute Black Polished 3CM

1 - 4/ (123)/ Absolute Black Polished 3CM

1 - 5/ (123)/ Absolute Black Polished 3CM

1 - 6/ (123)/ Absolute Black Polished 3CM

1 - 7/ (123)/ Absolute Black Polished 3CM

1 - 8/ (123)/ Absolute Black Polished 3CM

1 - 9/ (123)/ Absolute Black Polished 3CM

1 - 10/ (123)/ Absolute Black Polished 3CM

1 - 11/ (124)/ Absolute Black Polished 3CM

1 - 12/ (124)/ Absolute Black Polished 3CM

1 - 13/ (124)/ Absolute Black Polished 3CM

1 - 14/ (124)/ Absolute Black Polished 3CM

1 - 15/ (124)/ Absolute Black Polished 3CM

1 - 16/ (124)/ Absolute Black Polished 3CM

1 - 17/ (124)/ Absolute Black Polished 3CM

1 - 18/ (124)/ Absolute Black Polished 3CM

1 - 19/ (124)/ Absolute Black Polished 3CM

1 - 20/ (124)/ Absolute Black Polished 3CM

1 - 21/ (125)/ Absolute Black Polished 3CM

1 - 22/ (125)/ Absolute Black Polished 3CM

Bar-Code Scanner Options

Motorola CS3070
Batch mode

http://www.motorola.com/

Motorola CS3070
Paired with tablet via Bluetooth

http://www.motorola.com/

Linea-Pro 4
iPhone/iPod Touch 1D/2D Scanner

http://www.ipcprint.com/linea-pro-4.html

Motorola MC9190-G
Or any personal computer type bar-code scanner that can access the internet via WIFI. Windows Mobile is recommended OS for this type of scanner.

http://www.motorola.com/

Hold Labels

This section will discuss the information you need to start printing hold labels for your inventory as soon as possible.

- Recommended Media/Printer
- Hold Label Setup
- Hold Label Printout Example *Note: Example is not to scale.*

Recommended Media/Printer

Smart Label Printer 440

Seiko Instruments USA Inc.
labelprinters.sii-thermalprinters.com

Hold Label Media

Seiko Instruments USA Inc.
labelprinters.sii-thermalprinters.com

Model: White SLP-MPL4
Dimensions: 2-1/8” x 4”
Labels per Roll: 220

Bulk Label Trey

Seiko Instruments USA Inc.
labelprinters.sii-thermalprinters.com

Allows for label roll of 900
Label model: SLP-SRLB

Hold Label Setup

Configure Printed Information

SPS gives you the ability to configure the information you want to show on each barcode. See the list below to see what information can be put on the bar-code labels.

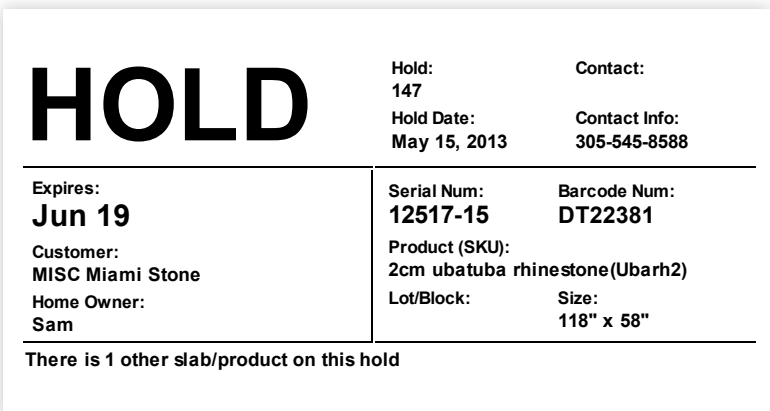
_____ Logo
_____ Code
_____ Fax Number
_____ Reference Address
_____ Reference Mobile
_____ Hold Date
_____ Printed Notes
_____ Customer Name (fabricator)
_____ Phone Number
_____ Reference Name (Homeowner/Designer/...)
_____ Reference Phone Number
_____ Side mark
_____ Expiry Date
_____ If Selected in Person

Print Setup

The print setup determines how the hold labels will print onto the desired media. The following information is the setup for Stone Profit System's bar-code label media (example on the next page). If you choose to use a different media these are the configurations that can be adjusted.

Note: The alignment of the print out to the bar-code sheet may vary from printer to printer. Some minor adjustments may need to be made.

10 Sheet/Roll Width
1 Rows Per Page (if roll enter 1)
0 Spacing Between Columns
20 Individual Label Height
32 Total Characters
1 Columns per Page/Roll
0 Spacing Between Rows
60 Individual Label Width
2 Left and Top Margin (within label)



Dynamic Data Migration File Formats

For dynamic data migration Stone Profit Systems will be sending you Excel files listing the information needed for each item to be migrated. There will be an Excel file for each of the migration types listed below. With these files you will fill/paste your information in the designated columns. The following pages in this book have the data fields listed out with descriptions and examples to help you provide SPS with the appropriate information.

Note: *Dynamic data will be required after the completion of the Static Data and should be worked on simultaneously to training. Dynamic data files are due the Friday before your go live date.*

HAVE FILES	# OF ENTITIES	STATIC MIGRATION TYPES
_____	_____	Inventory In-Stock
_____	_____	AR Invoices
_____	_____	AR Receipts
_____	_____	AP
_____	_____	Trial Balance

Inventory In-Stock

FIELD NAME	DATA TYPE	LENGTH	DESCRIPTION/EXAMPLE
ItemTypeValue	AlphaNumeric	50	*Enter the value for the product type for this Inventory line.* *SLAB / Tile*
IsIndivisibleItem	AlphaNumeric	10	Enter "on" if quantity from this inventory line cannot be sold partially. Has to be 'on' for Slab lines. The system is configured in all modules to not be able to select partial quantities if this field is set to 'on'. *on*
mtInventoryAccount	AlphaNumeric	50	Enter the inventory asset account number that gets debited for the value of this inventory line. *5040*
mtCurrentLocation	AlphaNumeric	50	Enter the name of the Location of the warehouse at which this inventory is currently located at. *Chicago*
mtItem	AlphaNumeric	150	Enter the name of the material this inventory belongs to. The material name has to match exactly to the name given in the item file. *Black Absolute 3cm*
CurrentSlabLength	Numeric	2 decimal places	Current length of the Slab. Leave blank for other types of products. *113.00*
CurrentSlabWidth	Numeric	2 decimal places	Current width of the Slab. Leave blank for other types of products. *69.00*
ReceivedLength	Numeric	2 decimal places	Length of the Slab as of the received date. Leave blank for other types of products. *113.00*
ReceivedWidth	Numeric	2 decimal places	Width of the Slab as of the received date. Leave blank for other types of products. *69.00*
CurrentQuantity	Numeric	2 decimal places	Current Quantity in stock for the Inventory Line. *54.15*
Quantity	Numeric	2 decimal places	Current Quantity in stock for the Inventory Line. *54.15*

UOM	AlphaNumeric	50	Unit of measure for the product. *SF*
UnitPrice	decimal(18, 2)	2 decimal places	Unit landed cost for the inventory line. *4.45*
Extended	decimal(18, 2)	2 decimal places	Total landed cost for the inventory line. *240.97*
SerialPrefix	AlphaNumeric	50	The prefix for the serial number of the inventory line. *IM*
SerialNumber	AlphaNumeric	50	The serial number of the inventory line. *1 / 2 / 3/ 4 /5*
SupplierBarcodeID	AlphaNumeric	50	Barcode ID or Barcode number for the inventory line in the previous system. *IM-1 / IM-2*
IDOne	AlphaNumeric	50	Additional information for the inventory item. E.g. : Lot# / Block# / Bundle # / Supplier Reference# / Supplier Code etc. *C1012*
IDTwo	AlphaNumeric	50	Additional information for the inventory item. E.g. : Lot# / Block# / Bundle # / Supplier Reference# / SupplierCode etc. *25*
IDThree	AlphaNumeric	50	Additional information for the inventory item. E.g. : Lot# / Block# / Bundle # / Supplier Reference# / SupplierCode etc. *ASD256*
IDFour	AlphaNumeric	50	Additional information for the inventory item. E.g. : Lot# / Block# / Bundle # / Supplier Reference# / SupplierCode etc. *C1012*
IDFive	AlphaNumeric	50	Additional information for the inventory item. E.g. : Lot# / Block# / Bundle # / Supplier Reference# / SupplierCode etc. *ASD256*
Bin	AlphaNumeric	50	Exact bin Location of the inventory line within the warehouse. *MS021*
Mnote1	AlphaNumeric	500	Any notes in the previous system on this inventory line.

AR Invoices

FIELD NAME	DATA TYPE	LENGTH	DESCRIPTION/EXAMPLE
mtCustomer	varchar(150)	150	Enter the name of the billing customer on the invoice. The name of the customer must match exactly to the name given in the customer file. *12081 / American Granite AND Marble*
TransactionNumber	varchar(50)	50	Invoice number or the credit memo number. *1016688*
TransactionDate	Date		Transaction date on the invoice or credit memo. *1/1/2013*
DueDate	Date		Due date for this transaction. *1/31/2013*
Amount	Numeric	2 decimal places	Open Balance or Credit on this transaction rounded to 2 decimals. *25000.25*
mtLocation	varchar(50)	50	Enter the location or profit center that this transaction is a part of. *Chicago*
mtPaymentTerms	varchar(50)	50	Payment terms on this invoice. *30 Days*

AR Invoices

FIELD NAME	DATA TYPE	LENGTH	DESCRIPTION/EXAMPLE
mtCustomer	AlphaNumeric	150	Enter the name of the billing customer on the open receipt or deposit. The name of the customer must match exactly to the name given in the customer file. *ABC Customer*
TransactionNumber	AlphaNumeric	50	Transaction number for the open receipt or deposit. *125252*
TransactionDate	Date		Transaction date for the open receipt or deposit. *1/1/2013*
Amount	Numeric	2 decimal places	Amount on the open receipt or deposit rounded to 2 decimals. *1256.50*

AP

FIELD NAME	DATA TYPE	LENGTH	DESCRIPTION/EXAMPLE
mtPartyName	AlphaNumeric	150	Enter the name of the supplier / vendor on the invoice. The party name must match exactly to the name given in the supplier or vendor file. *Freight Company*
TransactionNumber	AlphaNumeric	50	Invoice number or the credit memo number. *1016688*
TransactionDate	Date		Transaction date on the invoice or credit memo. *1/1/2013*
DueDate	Date		Due date for this transaction. *1/31/2013*
Amount	float	2 decimal places	Open payable or Credit on this transaction rounded to 2 decimals. *750.00*
mtLocation	AlphaNumeric	50	Enter the location or profit center that this transaction is for. *Chicago*
mtPaymentTerms	AlphaNumeric	50	Payment terms on this transaction. *30 Days*

Trial Balance

FIELD NAME	DATA TYPE	LENGTH	DESCRIPTION/EXAMPLE
mtAccountNumber	AlphaNumeric	50	Enter the account number for which there is a debit or credit balance. *100262*
mtAccountName	AlphaNumeric	200	Enter the name of the account for which there is a debit or credit balance. *Prepaid Expenses*
AccountID	AlphaNumeric	50	Account ID for this account. Entered by SPS.
Debit	Numeric	10	Debit balance if any, rounded to 2 decimals. *15500.00*
Credit	Numeric	10	Credit balance if any, rounded to 2 decimals. *15500.00*

Client Machine Tips

This section will cover various options/situations that you might encounter on each computer while you are starting out.

- Recommended Browser
- Browser Print Options
- Remote Support Setup
- Product Image size
- Minimum Hardware
- Minimum Software
- Network Requirements
- Domain Requirments
- Tablet / Mobile Devices

Recommended Browser Installation

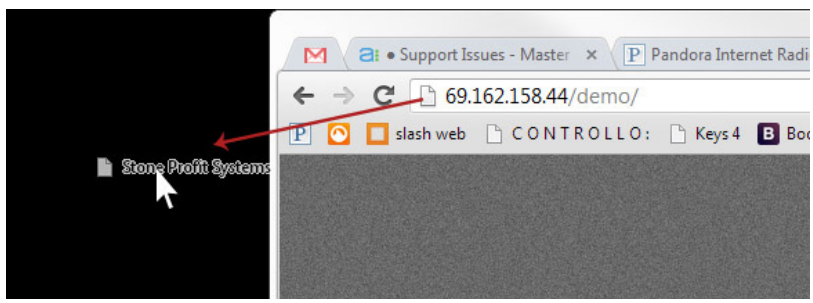
Google Chrome

Every web browser is slightly unique in the way that they respond to programming. One function can work perfectly in one browser and not work at all in the next. SPS has worked hard to make the system compatible across all browsers, but we have found that the system works best in Google Chrome.

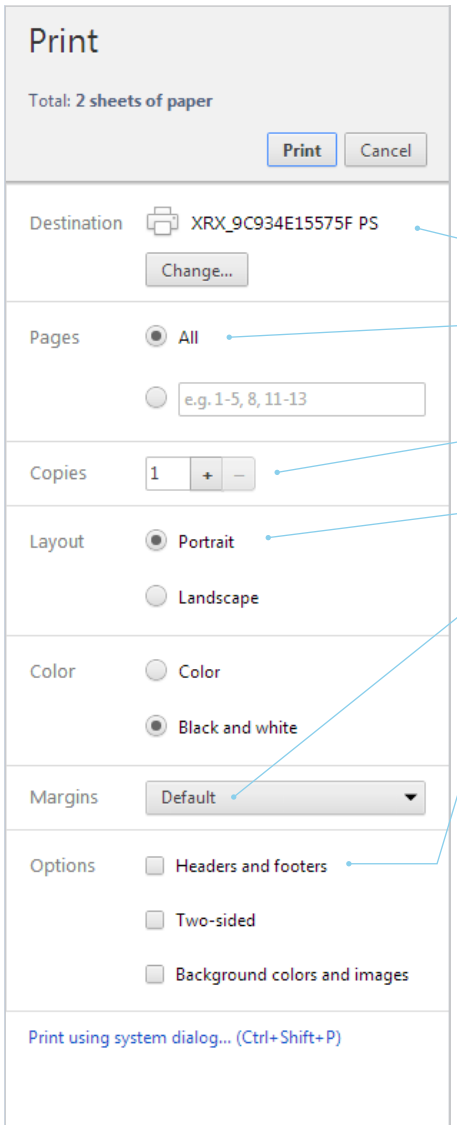
To Install Google Chrome (if not already there) Go to www.google.com/chrome. Once you have reached the web-page click the blue button that says “Download Chrome”, and follow the computers instructions to install.

Create a Shortcut to Your System

Once your system is installed on the server you will be given a URL. For ease of access we recommend that a shortcut is created on each computer. To do this, navigate to your system by entering the URL. Once you are at the login page, locate the icon just before the web-address in the address bar. Click and drag this icon to you desktop. See images below for reference.



Browser Print Options



Printing From Google Chrome

When you select to print a document from Stone Profit Systems you will see options like the example on the left. Below are some tips to make sure the settings are correct before you print.

- Make sure you have selected the desired printer
- Select all or designate specific pages to print. (all is default option)
- Input desired number of copies
- Make sure layout is set to “Portrait”
- Margins should be set to “default” or “minimum”
- Make sure “Headers and Footers” is turned off

Remote Support Setup

Remote Support Options

At various points of time Stone Profit Systems may be required to connect remotely to your computer for support or training purposes. When this occurs you will be asked to use one of the following software.

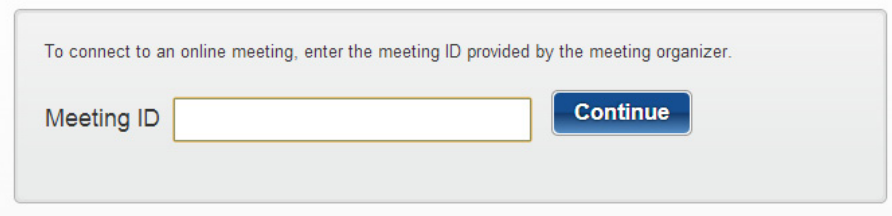
GoToMeeting GoToAssist TeamViewer

GoTo Meeting

SPS uses this software mostly for training purposes. It creates a connection between 2 or more computers that allows them to view the screen of one of the computers connected. SPS will create a meeting and you will be asked to do the following:

- Navigate to www.joingotomeeting.com.
- SPS will give you a 9 digit meeting ID that you will enter in the field and click continue.
- Your computer will download a file. Open that file and click run.
- Once the application is running you will be in the meeting.

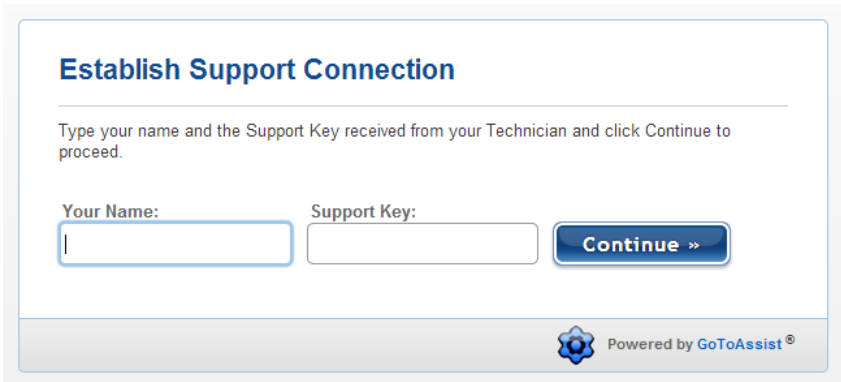
If multiple people are in the meeting you might also be given a phone number for the meeting. Dial this number and you will be connected to a conference call.



GoTo Assist

This option will be used for quick support calls. GoTo Assist creates a remote connection from the SPS computer to your computer, allowing SPS to see your screen, and control your computer. SPS will create the session and instruct you to do the following:

- Navigate to www.fastsupport.com
- Enter your name/company name in the name field.
- SPS will give you a 9 digit support key. Enter it into the support key field and select continue.
- Your computer will download the application.
- Click “yes” to allow the software to make changes.
- Click “yes” when asked if you would like to join session.


Establish Support Connection
Type your name and the Support Key received from your Technician and click Continue to proceed.
Your Name:
Support Key:
Continue »
Powered by GoToAssist®

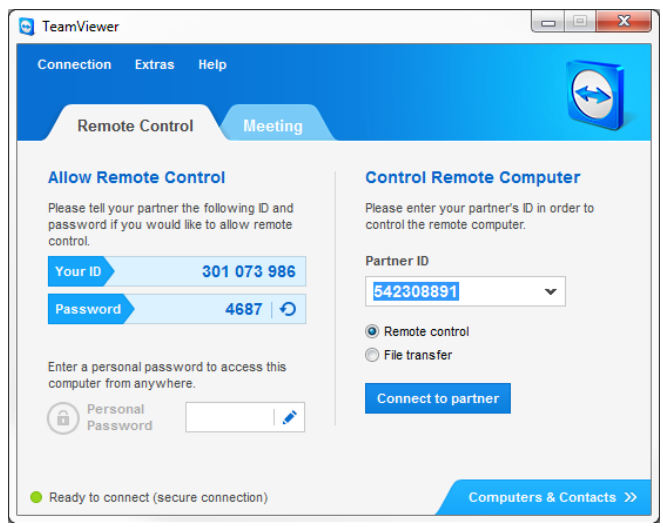
Team Viewer

This option will be used during the initial setup as well as support calls. Once this application is downloaded and installed it will stay on your computer making it easy and quick for SPS to establish a connection.

- Navigate to www.teamviewer.com
- Click on green download button in the center of the page.
- Your computer will download the application.
- Open the application instal file, and click “run”.
- Select the way in which Team Viewer should operate. SPS recommends “install”.
    - Install - this option will install the application to your computer. Next time you need to use it you would not have to download.
    - Run - this option will run the application without installing it. Once you have finished the session the application will no longer be there.
- Click yes to allow Team Viewer to make changes to your computer.
- Select “Personal / non-commercial use”
- Accept the terms and agreements, and click “next”.
- Select “No” and click “next”.
- Application will install.

At this point the application is installed. You will now be able to establish a remote connection with SPS by opening Team Viewer and following the instructions bellow.

- You will see a 9 digit number labeled “Your ID”. Give this number to the SPS team member.
- Provide them with the password when asked.



Product Image Size

Image Sizes

Stone Profit Systems allows you to upload photos for each product, lot, and individual slabs. This can be useful to create an image library for all your products so you can have intercompany reference, and the ability to send your customers images through e-mail. Also, If you plan on using the web connect module these images can be pushed to your web site instantly creating a web friendly product index.

To upload image to the system it is important to have the images meet size restrictions as well as retain quality of the image. In most cases you will not be able to upload the images directly from your camera. Typically cameras take pictures and save them with large file sizes that will be to large to upload. To repair this you will need to re-size all the images to make them suitable for use on the web.

Acceptable Sizes

- 1024x768 pixels (maximum)
- 800x600 pixels (Recommended)
- 640x480 pixels
- 512x384 pixels (minimum)

- The resolution for each of the dimensions is 72dpi.
- File size should be Under 200KB
- The aspect ratio or proportions may differ from your photo. In that case, adjust image proportionally to the width.
- If image needs to be cropped, crop the image to the desired dimensions.
- If adjusting/cropping manually, constrain proportions by holding shift key.

Minimum Hardware for All Client Computers

The minimum hardware that is required to install and run SPS Quantum includes:

ITEM	REQUIREMENT
Processor	Intel Pentium/Celeron family or compatible Pentium III Xeon or higher processor minimum 1.4 GHz or higher recommended
RAM	2GB RAM or More recommended
Monitor	Super VGA (1024 x 768) or higher resolution monitor
Communications	DSL or higher quality connection is required to access the application via an internet browser.

Software Requirements for All Client Computers

The following software must be present on the computer for SPS Quantum to be accessed.

REQUIREMENT	Notes
Google Chrome 10.0.612 or higher	Web browser clients can run on many operating systems. However, those configurations are supported only for issues that can be reproduced when the browser is running on an operating system that is supported for SPS Quantum.
Internet Explorer 9.0	
Mozilla Firefox 3.5 or higher	
Safari 4.1.3 or higher	
2007 Office release, Service Pack 2 or 2010 Office release	

Supported Client Operating Systems

OPERATING SYSTEM	Notes
Windows 7 Professional edition, Home Edition, Ultimate edition, or Enterprise Edition	Both 32-bit and 64-bit versions of Windows 7 are supported.
Windows Vista Business Edition, Home Edition, Ultimate Edition or Enterprise Edition with Service Pack 2	Both 32-bit and 64-bit versions of Windows Vista are supported.
Windows XP Professional Edition, Home Edition	Both 32-bit and 64-bit versions of Windows XP are supported.

Network Requirements

In the table below are the minimum network requirements for connection between the client and the SPS Quantum application server (QAS) as well as the connection between the SPS QAS and the database servers.

VALUE	CLIENT TO QAS	QAS TO DATABASE
Bandwidth	DSL or higher quality connection	100mps
Latency		Less than 5 Milliseconds

We recommend that you consider the following types of connections when planning your system:

• For a system that uses a local area network (LAN) or wide area network (WAN), connect by using IP restricted access to the IP address of the server that is setup as a web site in Internet Information Services. SPS Quantum can operate on networks that use Internet Protocol Version 4 (IPv4) or Internet Protocol Version 6 (IPv6).

Domain Requirements

Consider the following domain requirements when you install SPS Quantum:

• Computers that are running SPS Quantum must have access to the server on which the SPS Quantum system has been setup in IIS.

Tablet / Mobile Device Options

Apple iPad, iPad Mini, iPhone, iPod Touch

http://www.apple.com/ipad/

Google Nexus 4, 7, and 10

https://play.google.com/store/devices?feature=corpus_selector

Samsung Galaxy Tab and Note

http://www.samsung.com/us/mobile/galaxy-tab

Windows Surface

http://www.microsoft.com/Surface/en-US

GETTING STARTED

A CHECKLIST AND GUIDE

Stone Profit Systems